

# **Medicaid School Administrative Match Advisory Committee**

## **Meeting Summary**

**July 24, 2003**

The Medicaid Administrative Match Advisory Committee met on July 24, 2003 at the OSPI Office in Burien from 10 a.m.-3 p.m. The key agenda item of the meeting was the Time Study.

Attendees (members and substitutes): Tim Merlino (ESD 112), Patty Guerrero (Bremerton SD), Martin Mueller (OSPI), Mick Moore (Puget Sound ESD), Brian Lewis (ESD 114), Michelle Ewell (ESD 123), Norm Koenig (ESD 105) John Molohon (ESD's 113/117), Neil Sullivan (Spokane SD #81), Marcie Senger (Tacoma SD), Mike Sullivan (Granite Falls SD), Jennifer Carrougner (OSPI Audit), Randy Hauff (Tonasket SD), Marilyn Sollers (NW ESD 189), and Marty Crisp (Battleground SD).

Other attendees: Dave Whitling (Facilitator), RosaMaria Espinoza (MAA), Ramona Roberts (MAA), Sharon Reddick (MAA), Tom Reese (Consultant), Dario Longhi (DSHS Researcher) and Dick Hancock (MAA).

Advisory Group Members not present: Larry Peters (Pasco SD), Jill Johnston (Wahluke SD), and Jim Anderson (Rochester SD).

Dick Hancock convened the meeting at 10:00 A.M... There was a brief overview of **minutes of the last meeting** and participants were invited to make corrections/additions. There was a question regarding approval authority for the time study. Dick directed committee members to excerpts from Circular A-87, and a subpart E of 45 CFR included in their folder. After a brief discussion, Dick offered to talk with the State Auditors if need be, and OSPI and MAA will discuss this further and report back to the advisory group. The **agenda** for the day was reviewed and recommended changes were discussed.

### **School Ad Match work plan**

Dick Hancock reviewed the updated work plan. The Division of Cost Allocation (DCA) has given MAA until October 1 to submit a proposed time study methodology for allocation of administrative match costs. DCA is a separate entity within DHHS and MAA has not yet talked with CMS (Centers for Medicare and Medicaid Services) about the MAA workplan. The plan proposes full implementation of the CMS Claiming Guide on December 1, 2003 rather than October 1, 2003 (the effective date set by CMS). The additional 2 months is needed for review and signing of SD & ESD contracts for service, and to provide training on new activity definitions and time study methods.

The work plan also calls for MAA to develop the Ad Match manual in August and to train SD & ESD coordinators and fiscal staff in September. Coordinators would then train school staff in their districts in October and November for full operation Dec.1<sup>st</sup>.

**Performance Outcome Measures:** Dick Hancock noted that additional work needs to be done on performance measures. The data OSPI requires of school districts, and MAA data from its payment and managed care systems do not provide us with measures of Medicaid Administrative Match outcomes.

Concerns of the committee were that there is no written requirement to have outcome measures and confidentiality of information has to be maintained. MAA's position is that it's important that the program prove its effectiveness and outcome measures can help do that.

Neil Sullivan suggested that success stories of access to health care for kids might be a good way to measure outcomes of the program. He offered to draft a concept paper on outcome measures, touch bases with Rosalind Philips of OSPI, and submit the paper to Dick Hancock for review. The committee agreed and put this topic on the agenda for the next meeting.

### **Time Study Presentation**

Dario Longhi, Ph.D., of the DSHS Division of Research & Data Analysis, summarized his experience and credentials and presented the proposed time study methodology. Among the statistical concepts issues and options discussed were:

- From the federal perspective the 95% confidence level with 5% precision required for the time study were statewide level requirements, not regional or school district level. And based on Dario's discussions with John Lynch, CMS Region X program manager, the 5% precision applied to the error rate in the statewide federal claim (an error rate of about \$1.7 million, given the 2002 claim of about \$34 million.)
- Statewide, approximately 3.2 % of staff time (for those eligible to provide Medicaid ad match activities was claimed in 2002. Given this small of an overall percent, a large random moment sample would be needed to achieve 5% precision.
- School district and ESDs can be stratified by the count of staff, namely small (0-149), medium (150-549), large (550 – 1,549) and very large (1,550 – 5,149).
- School/ESD staff eligible to participate in ad match activities should also be stratified for time sampling purposes. The strata are designated staff (counselors, nurses, social workers, coordinators, others to be defined – about 3,500 statewide) who assist low income students to access Medicaid and services, and non-designated staff such as teachers and classroom assistants who primarily refer students to designated staff.
- The proposed amount of time to be sampled would be 5 days per quarter.
- For non-designated staff in all but small school districts, time study data would be combined into a statewide total in order to achieve statistically valid data with 5% precision. The federal revenue for this portion of the Ad Match Activities would then be allocated to school districts and ESDs based on the proportion of designated staff time in each SD/ESD.

There was extensive discussion of the assumptions and many suggestions were offered by the committee. There was not time to discuss revenue allocation options. They will be

an agenda topic of the next meeting. Below are some of the comments, questions, and concerns that arose from the discussion.

- Can you claim cost outside contracted/allocated hours? Answer: No.
- MAA needs to know the various categories of school employees and have quarterly updates. Dick Hancock asked that committee members send this information to him or his staff. (See the bottom of this list for a change to this plan.)
- Where does the requirement for 95% confidence and 5% precision come from? It appears to be an example in the CMS guide not a requirement. Dario pointed out in the CMS guide where, in his view, 95/5 is a federal requirement.
- The 3.2% figure, which represents the percentage of eligible staff participating, seemed low to one committee member.
- Who will do the sampling? Dario stated it needs to be a neutral third party.
- “One day of every 12 in a 60 day period is too much. Teachers won’t do this.”
- “Do sampling days have to be a different day of the week?”
- “You are tripling the work of the teacher with the new time study form.”
- “Can the quarterly training be restricted to only those doing the time study?”
- How do you determine eligible days for each school district?”
- How do we sample the summer quarter? Committee suggested the principle of “Eligible days and eligible staff?” Eligible days are the statewide requirement of 180 school days. These should represent the three quarters regardless of some being in June and others being in August. The committee recommended that the sample be selected from all 180 days rather than a lesser number of the “typical days”. The sample would be specific to each district’s 180 day period.
- Can we determine eligible participants (staff) once a year? MAA’s response was “no, quarterly updates are needed”.

It was agreed there would be a meeting (John Molohon, Dick Hancock, Dario and OSPI representative) to clarify several of the issues listed above. Sampling and allocation models will be discussed at the next meeting.

**Training.** Dick introduced the proposed September/October training schedule for School District and ESD ad match coordinators and business/finance managers. MAA will conduct training and the committee recommended using the last 2 weeks of September. MAA will confirm ESD locations and dates and get information out to SDs and ESDs.

### **Decisions**

1. Neil Sullivan will submit a performance outcome measure concept to Dick Hancock.
2. OSPI and MAA will meet/update the State Auditor on School Ad Match progress.
3. There will be a meeting with MAA, John Molohon, Dario Longhi and a representative of OSPI to clarify questions that arose from the time study discussion.

4. The Advisory Committee will continue to meet monthly through December 2003 and then assess frequency of meeting.

### **Next Steps**

The next meeting will be at the OSPI Burien conference center on August 19, 2003 from 10 A.M-3 P.M. The focus of the agenda at this meeting will be the time study/allocation options, report on the meeting with the State Auditor, update on performance measures, update on overpayments, and a summary of changes in the CMS guide. The meeting adjourned at 3:15.

Respectfully submitted:  
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